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CONTENTS

Page

COTTON AND OTHER FIBER
Cotton-Price Quotations on World Markets............ 642
Cotton Market in Peru Inactive With Little Cotton Left For Sale.................................... 638
Cotton Consumption in Belgium at High Level........ 640
Drop in Uruguayan Cotton Consumption............... 641

FATS AND OILS
World Soybean Production Smallest in Postwar Years.. 610
French Oilseed Harvest Sets New Record.............. 628
Denmark Has Smaller Oilseed Production.............. 629
U.S. Imports of Specified Vegetable Oils and Oilseeds.. 630
U.S. Exports of Specified Fats, Oils and Oilseeds... 631

FRUITS, VEGETABLES AND NUTS
Grape Production Increases in 1949.................. 613
India 1949 Cashew Harvest Below Average............. 620
Brazil Nut Harvest in 1949 Surpasses Earlier Predictions.. 624

GRAINS, GRAIN PRODUCTS AND FEEDS
World Barley and Oats Below 1948 and Below Average.. 605
Burman Rice Exports Slightly Less in 1949........... 630
Siam's Rice Exports Increase; Good Crop Forecast.... 632
U.S. Rice Exports Above Average..................... 634
Colombia Produces Record Rice Crop.................. 635

TOBACCO
Mexico's 1948-49 Tobacco Crop Estimate Revised Downward.. 635
Brazil's 1949 Tobacco Exports Above 1948............ 636
Cyprus Proposes Establishment of Central Tobacco Marketing Organization............................ 636

TROPICAL PRODUCTS
Brazil Expects Larger Cacao Output in 1949-50....... 637
Guatemala's 1949-50 Coffee Production Larger Than Expected.. 637

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

TARIFF CONFERENCE SET FOR SEPTEMBER 1950

A "third round" of negotiations for reciprocal tariff and other trade barrier reductions will be held in September 1950 by the United States and other countries under the General Agreement on Tariffs and Trade, according to announcement by the U.S. Department of State.

The GATT meeting next September will afford opportunity to the Contracting Parties to the General Agreement on Tariffs and Trade under the Geneva and Annecy protocols to negotiate with those of the 27 "new" countries which accepted the invitation extended to them to participate. There may also be additional negotiations between the present Contracting Parties.

United States participation in the conference will be under the authority of the Trade Agreements Act of 1934, as amended, and under the procedure established by executive order for conducting the trade agreements program. The negotiations will be held at a place to be determined in February 1950 by the Contracting Parties to the General Agreement.

Studies in preparation for the conference are now under way in intra-governmental committees. Public hearings will be held in the spring of 1950 on products on which the United States will consider making or requesting concessions.

(Late News Begins on Page 643)

FOREIGN CROPS AND MARKETS....

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WORLD BARLEY AND OATS BELOW 1948 AND BELOW AVERAGE

World production of barley and oats in 1949 is still estimated at about 118 million short tons, based on the latest information available to the Office of Foreign Agricultural Relations. This would be 5 percent less than a year ago and 7 percent below the 1935-39 average of 126.5 million tons. While the total of the two grains is the same as the earlier estimate, changes in some areas result in a slightly smaller total for barley, and a larger total for oats. (see Foreign Crops and Markets, October 10, 1949).

World barley production, now placed at 2,250 million bushels, is 95 percent of both the prewar average and of last year's outturn. That total is about 30 million bushels less than the previous world estimate largely because of a drop in China's official estimate. Oats production was increased by 30 million bushels in Europe, where improved conditions, especially in Germany, brought the harvest above the expected level. Changes in other areas were small.

North America's outturn of these grains was substantially above the prewar average, though smaller than the large 1948 harvest. Expanded acreage, as well as larger than average yields, contributed to the increase. Production of both grains in Canada was smaller than the previous estimate, but that reduction was largely balanced by increases in the United States estimates, especially for oats, since publication of the last world summary.

The 1949 outturn of barley in Europe is now estimated at 675 million bushels, compared with 667 million bushels in the prewar years. The oats crop of 1,375 million bushels is 85 percent of the prewar crop of 1,611 million bushels.

The Soviet Union's crops of barley and oats were estimated to be slightly smaller than in 1948, and substantially below the prewar average (1935-39). Yields are estimated to be about 10 percent below that average and acreage reduced by about 25 percent. A shift to rye from barley and oats appears to account for the bulk of the decline.

In Asia the 1949 barley estimate is now given at 700 million bushels, and oats production unchanged at 83 million bushels.

In Africa, the estimates of 135 million bushels for barley and 25 million for oats are above average and also larger than in 1948. Above-average yields in French North Africa, especially in Algeria and Tunisia contributed much to the increase.

The season in South America is now well advanced, with harvesting general. Official estimates are not available for most areas, but information available points to better-than-average yields except in Chile. In that country drought is reported to have reduced yields below average.

BARLEY: Acreage, yield per acre, and production in specified countries, year of harvest, averages 1935-39 and 1940-44, annual 1947-49 1/

Continent and country	Acreage 2/					Yield per acre 3/					Production				
	Average					Average					Average				
	1935-39	1940-44	1947	1948	1949 4/	1935-39	1940-44	1947	1948	1949 4/	1935-39	1940-44	1947	1948	1949 4/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA															
Canada	4,291	6,461	7,465	6,495	6,017	20.7	27.4	18.9	23.9	20.0	88,882	176,850	141,372	155,018	120,383
Mexico	374	391	423	418	425	10.6	13.2	13.6	13.2	13.6	3,960	5,171	5,770	5,512	5,787
United States	10,817	14,392	11,014	12,046	10,019	22.1	23.7	25.5	26.3	23.4	238,622	340,464	281,185	317,037	234,025
Estimated total 5/	15,480	21,250	18,900	18,960	16,460	-	-	-	-	-	331,000	522,000	428,000	478,000	360,000
EUROPE															
Austria	401	383	300	285	311	32.6	30.1	20.7	27.4	31.0	13,087	11,520	6,200	7,800	9,650
Belgium	74	137	237	210	194	48.2	47.6	42.2	52.4	58.7	3,570	6,525	10,000	11,000	11,396
Bulgaria	676	544	725	-	-	25.7	18.8	16.1	-	-	17,400	10,200	12,000	-	-
Czechoslovakia	6/ 1,600	1,560	1,450	1,450	1,460	6/ 32.4	30.8	25.5	29.3	32.9	6/ 51,800	48,000	37,000	42,500	48,000
Denmark	946	984	1,152	1,090	1,121	55.9	56.0	53.0	61.5	64.1	52,881	55,084	61,035	67,011	71,879
Finland	280	294	365	345	330	28.2	21.7	21.6	29.0	27.3	7,900	6,373	7,900	10,000	9,000
France	1,897	1,790	2,369	2,027	2,170	27.9	23.7	23.2	28.8	29.9	53,015	42,500	55,000	58,474	64,850
Germany	3,120	-	-	-	-	41.7	-	-	-	-	130,000	-	-	-	-
Greece	525	490	-	525	479	17.8	13.6	-	19.8	17.5	9,365	6,640	-	10,375	8,391
Hungary	1,163	1,235	1,300	-	-	25.9	24.3	16.9	-	-	30,178	30,000	22,000	-	-
Ireland	118	172	146	120	150	45.9	43.1	42.5	54.2	54.7	5,413	7,417	6,200	6,500	8,200
Italy	475	575	599	620	620	20.9	17.7	14.3	17.7	17.4	9,950	10,200	8,584	11,000	10,800
Netherlands	107	109	169	132	121	55.5	51.8	48.4	49.2	70.1	5,934	5,642	8,175	6,500	8,487
Norway	143	126	103	91	104	38.2	26.4	38.8	45.0	39.7	5,467	3,330	4,000	4,096	4,124
Poland	2,570	-	-	-	-	29.6	-	-	-	-	76,000	-	-	-	-
Portugal	320	-	324	306	320	12.8	-	12.5	13.2	14.5	4,100	-	4,064	4,051	4,630
Rumania	2,030	1,620	-	-	-	13.8	15.3	-	-	-	28,000	24,800	-	-	-
Spain	7/ 4,549	4,075	3,775	3,850	3,825	7/ 21.3	18.4	18.5	19.5	20.7	7/ 97,059	75,000	70,000	75,000	79,000
Sweden	252	260	247	217	224	39.5	34.4	32.7	40.8	34.9	9,951	8,956	8,082	8,859	7,808
Switzerland	13	53	67	62	60	33.1	40.3	37.6	40.3	40.1	430	2,135	2,522	2,499	2,407
United Kingdom	934	1,620	2,060	2,083	2,058	39.2	40.9	36.7	45.4	46.3	36,596	66,183	75,530	94,593	95,293
Yugoslavia	1,045	1,000	-	-	-	18.0	16.6	-	-	-	18,800	16,600	-	-	-
Estimated total 5/	23,260	22,480	23,040	22,120	22,680	-	-	-	-	-	667,000	610,000	556,000	630,000	675,000
U.S.S.R. (Europe and Asia)	26,600	-	20,500	21,500	21,500	16.0	-	15.1	14.7	14.4	425,000	-	310,000	315,000	310,000

ASIA															
Iran	6/ 1,545	1,567	1,700	1,700	1,762	6/ 23.1	21.5	21.0	23.0	17.0	6/ 35,728	33,735	35,636	39,040	30,000
Iraq	6/ 1,932	2,620	2,100	1,544	1,853	6/ 11.6	10.3	13.8	17.0	18.9	23,635	27,100	29,000	26,180	35,000
Lebanon	8/	88	54	54	49	8/ 8/	14.0	21.3	22.6	21.1	8/	1,234	1,148	1,222	1,033
Palestine	571	416	-	-	-	5.7	8.6	-	-	-	3,238	3,579	-	-	-
Syria	8/ 793	651	902	844	-	8/ 19.4	17.8	11.5	16.6	-	8/ 15,386	11,589	10,334	14,015	-
Turkey	4,592	4,822	4,302	4,670	3,700	20.9	17.6	15.9	19.3	14.9	96,129	85,017	68,212	90,000	55,000
China	6/ 16,000	14,200	15,818	15,505	15,200	6/ 21.7	21.7	22.0	22.0	21.1	6/ 347,000	308,200	347,863	341,178	305,000
Manchuria	6/ 353	237	-	-	-	6/ 18.3	22.4	-	-	-	6/ 6,462	5,300	-	-	-
Indian Union 9/	6/ 5,793	5,918	7,082	7,509	7,640	6/ 15.6	15.3	15.9	16.2	13.8	6/ 90,253	90,552	112,653	121,520	105,747
Pakistan 9/	6/ 486	546	490	478	611	6/ 14.5	13.9	12.5	13.1	13.7	6/ 7,047	7,588	6,109	6,253	8,353
Japan	1,888	2,097	1,868	2,174	2,234	34.6	31.1	25.3	29.5	33.6	65,402	65,283	47,231	64,199	75,094
Korea	2,674	2,620	-	-	-	19.5	20.6	-	-	-	52,096	54,000	-	-	-
Estimated total 5/	37,8[illegible]	37,070	38,300	38,380	37,600	-	-	-	-	-	763,000	715,000	710,000	765,000	700,000
AFRICA															
Algeria	3,051	2,714	1,800	2,500	2,700	10.9	8.8	9.4	16.4	16.7	33,132	23,836	17,000	41,000	45,000
Egypt	276	331	260	240	185	38.8	35.2	31.7	33.8	36.2	10,697	11,662	8,250	8,100	6,700
French Morocco	4,448	5,130	3,850	3,650	4,109	12.0	9.8	15.6	16.0	12.2	53,279	50,189	60,000	58,500	50,000
Tunisia	1,182	1,180	988	1,329	1,530	7.7	4.8	4.6	3.5	11.4	9,048	5,695	4,593	4,593	17,453
Union of South Africa	6/ 86	129	90	80	-	6/ 18.4	15.1	18.4	17.7	-	1,555	1,946	1,653	1,412	-
Estimated total 5/	10,310	10,800	8,400	9,050	9,810	-	-	-	-	-	121,000	107,000	104,000	128,000	135,000
SOUTH AMERICA															
Argentina	1,286	1,090	1,630	1,700	1,500	17.6	22.8	24.5	16.5	20.0	22,586	24,805	40,000	28,000	30,000
Chile	184	122	154	131	137	27.4	28.3	32.0	30.2	25.5	5,041	3,453	4,930	3,954	3,500
Uruguay	44	54	52	77	80	14.8	12.8	10.0	15.5	15.0	649	693	521	1,194	1,200
Estimated total 5/	2,140	1,910	2,600	2,670	2,480	-	-	-	-	-	38,000	39,000	58,000	46,000	47,000
OCEANIA															
Australia	648	610	839	1,040	1,050	18.0	15.7	25.9	16.3	18.1	11,651	9,590	21,725	17,000	19,000
New Zealand	24	32	63	56	55	39.7	36.7	34.5	41.9	34.5	952	1,175	2,175	2,344	1,900
Total	672	642	-	1,096	1,105	-	-	-	-	-	12,603	10,765	23,900	19,344	20,900
Estimated world total 5/	116,320	115,030	112,640	113,780	111,640	-	-	-	-	-	2,358,000	2,325,000	2,190,000	2,380,000	2,250,000

1/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1949 is combined with preliminary forecasts for the Southern Hemisphere harvests which begin late in 1949 and end early in 1950. 2/ Figures refer to harvested areas as far as possible. 3/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. 4/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, preliminary forecasts based largely on acreage and weather conditions to date. 5/ Estimated totals, which in the case of production, are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. 6/ Average of less than 5 years. 7/ Figure for 1935 only. 8/ Estimates for Syria and Lebanon not shown separately during this period. 9/ Estimates for reporting areas only. Allowances for non-reporting areas, not shown, are included in estimated total for Asia.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries.

OATS: Acreage, yield per acre, and production in specified countries, year of harvest, averages 1935-39 and 1940-44, annual 1947-49 1/

Continent and country	Acreage 2/					Yield per acre 3/					Production				
	Average					Average					Average				
	1935-39	1940-44	1947	1948	1949 4/	1935-39	1940-44	1947	1948	1949 4/	1935-39	1940-44	1947	1948	1949 4/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA															
Canada 5/	13,246	13,614	11,048	11,200	11,389	25.5	34.1	25.2	32.0	27.8	338,071	463,944	278,670	358,807	316,558
Mexico	29	87	108	81	148	16.0	19.5	21.1	15.3	20.0	465	1,699	2,275	1,240	2,962
United States	35,761	38,075	38,451	40,191	40,619	29.2	31.8	31.2	37.1	32.5	1,045,329	1,212,146	1,199,422	1,491,752	1,321,075
Estimated total 6/	49,040	51,780	49,610	51,470	52,160	-	-	-	-	-	1,384,000	1,678,000	1,480,000	1,852,000	1,641,000
EUROPE															
Austria	686	567	550	555	565	41.9	37.0	30.0	34.2	38.9	28,746	21,000	16,500	19,000	22,000
Belgium	548	390	618	515	480	74.7	70.2	67.2	70.9	82.0	40,946	27,367	41,500	36,500	39,348
Bulgaria	362	401	410	-	-	24.9	21.4	-	-	-	9,000	8,586	-	-	-
Czechoslovakia	1,830	1,680	1,510	1,511	1,421	46.4	45.1	35.4	41.4	48.6	85,000	75,800	53,500	62,500	69,000
Denmark	932	843	847	815	761	75.3	76.1	70.9	83.5	85.6	70,205	64,112	60,068	68,067	65,105
Finland	1,030	926	975	1,050	1,075	43.7	34.6	32.4	42.9	41.4	45,000	32,027	31,600	45,000	44,500
France	8,089	6,300	6,451	6,026	5,871	40.6	34.9	32.0	38.6	36.7	328,653	220,000	206,500	232,860	215,362
Germany	5,200	-	-	-	-	60.6	-	-	-	-	315,000	-	-	-	-
Greece	350	349	-	355	316	24.3	20.1	-	21.0	21.1	8,510	7,025	-	7,468	6,669
Hungary	558	660	600	-	-	35.9	36.4	25.0	-	-	20,042	24,000	15,000	-	-
Ireland	571	844	826	880	750	68.8	62.2	55.3	63.0	56.0	39,265	52,535	45,698	55,447	42,000
Italy	1,062	1,690	1,187	1,175	1,156	35.9	20.4	27.2	30.6	25.5	38,150	34,400	32,263	36,000	29,500
Luxembourg	65	56	60	52	51	44.8	45.9	41.2	39.5	46.0	2,910	2,572	2,469	2,053	2,344
Netherlands	360	291	404	350	333	71.6	62.8	57.0	62.2	84.9	25,769	18,287	23,011	21,761	28,288
Norway	212	226	187	182	208	61.0	45.7	48.5	67.0	55.0	12,940	10,318	9,062	12,189	11,443
Poland	4,900	-	-	-	-	41.6	-	-	-	-	204,000	-	-	-	-
Portugal	865	-	725	727	793	12.0	-	11.0	9.4	9.5	10,350	-	7,948	6,853	7,520
Rumania	1,620	1,340	-	-	-	23.1	24.2	-	-	-	37,500	32,400	-	-	-
Spain	7/ 1,848	1,800	1,550	1,670	1,670 7/	21.3	21.1	18.1	21.9	21.0	7/ 39,369	38,000	28,000	36,500	35,000
Sweden	1,641	1,476	1,308	1,210	1,246	53.1	39.4	35.7	45.1	44.8	87,198	58,136	46,722	54,601	55,804
Switzerland	28	83	85	82	77	56.9	66.3	60.2	54.9	61.4	1,593	5,505	5,119	4,499	4,726
United Kingdom	2,430	3,764	3,308	3,335	3,251	57.0	58.4	53.1	62.2	60.8	138,628	219,926	175,630	207,410	197,820
Yugoslavia	893	850	-	-	-	24.5	22.5	-	-	-	21,900	19,100	-	-	-
Estimated total 6/	36,110	34,920	32,780	32,140	31,980	-	-	-	-	-	1,611,000	1,460,000	1,185,000	1,355,000	1,375,000
U.S.S.R. (Europe and Asia)	49,500	-	35,500	36,500	37,000	23.5	-	24.2	21.4	20.9	1,165,000	-	860,000	780,000	775,000

ASIA															
Syria	8/ 24	-	-	-	-	8/ 27.6	-	-	-	-	8/ 662	-	-	-	-
Turkey	636	871	670	687	560	26.6	21.6	18.1	30.6	21.4	16,893	18,779	12,126	21,000	12,000
China	9/ 2,600	-	2,329	2,309	2,322	9/ 23.1	-	20.8	23.7	21.5	9/ 60,000	-	48,429	54,802	50,000
Japan	310	324	185	200	220	37.0	30.4	25.0	32.0	32.6	11,481	9,838	4,616	6,407	7,165
Korea	9/ 242	-	-	-	-	9/ 11.2	-	-	-	-	9/ 2,718	-	-	-	-
Estimated total 6/	4,010	4,650	3,930	3,950	3,890	-	-	-	-	-	96,000	104,000	79,000	96,000	83,000
AFRICA															
Algeria	465	544	400	412	452	23.4	19.2	13.8	25.5	25.1	10,859	10,470	5,500	10,500	11,354
French Morocco	104	91	95	107	114	26.5	25.7	25.2	33.6	29.1	2,751	2,339	2,391	3,593	3,321
Tunisia	84	79	60	60	74	19.9	17.6	10.0	9.2	23.3	1,674	1,390	600	550	1,722
Union of South Africa	7/ 544	-	800	600	-	7/ 13.3	-	17.6	11.2	-	6,966	7,238	14,058	6,722	-
Estimated total 6/	1,210	1,440	1,380	1,210	1,360	-	-	-	-	-	22,000	22,000	23,000	22,000	25,000
SOUTH AMERICA															
Argentina	1,974	1,855	1,648	1,700	1,500	25.4	26.7	29.1	28.2	26.7	50,182	49,507	48,000	48,000	40,000
Chile	279	218	233	250	245	27.5	27.1	24.7	22.4	24.5	7,670	5,900	5,749	5,601	6,000
Uruguay	213	224	140	180	225	14.6	12.5	18.5	18.8	15.6	3,100	2,790	2,589	3,376	3,500
Estimated total 6/	2,4[illegible]	2,320	2,060	2,170	2,000	-	-	-	-	-	62,000	59,000	57,000	58,000	50,000
OCEANIA															
Australia	1,593	1,626	2,105	1,900	1,700	14.7	12.4	24.2	17.4	16.5	23,351	20,179	50,871	33,000	28,000
New Zealand	63	63	63	63	63	56.2	61.2	56.6	44.1	41.3	3,539	3,853	3,567	2,781	2,600
Total	1,656	1,689	2,168	1,963	1,763	-	-	-	-	-	26,890	24,032	54,438	35,781	30,600
Estimated world total 6/	144,020	141,200	127,430	129,400	130,150	-	-	-	-	-	4,367,000	4,300,000	3,740,000	4,200,000	3,980,000

1/ Years shown refer to hears of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1949 is combined with preliminary forecasts for the Southern Hemisphere harvests which begin late in 1949 and end early in 1950. 2/ Figures refer to harvested areas as far as possible. 3/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. 4/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, preliminary forecasts based largely on acreage and weather condition to date. 5/ Production and yield reported in bushels of 34 pounds. 6/ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. 7/ Figure for 1935 only. 8/ Includes estimate for Lebanon. 9/ Average of less than 5 years.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries.

Yield prospects for Australia are better than average. Barley production is expected to be larger than in 1948 and well above average. The oats outturn is also expected to be above average though not up to last year's crop, mainly because of reduced seedings.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Robert L. Gastineau, Judith E. Downey, Stanley Mehr, Mary E. Long, and Tilmer O. Engebretson.

WORLD SOYBEAN PRODUCTION SMALLEST IN POSTWAR YEARS 1/

World soybean production in 1949 is placed at 501.7 million bushels, according to a preliminary estimate of the Office of Foreign Agricultural Relations. This year's output is 10 percent below the record harvest of 558.4 million (revised) in 1948. Smaller crops are reported for the United States, China and several of the minor producing countries.

Canada's 1949 soybean crop of more than 2.6 million bushels is a record and exceeds that of a year ago by 43 percent. This is the sixth consecutive season that soybean production has shown an increase. During the crop year ended July 31, 1949, imports of soybeans and oil in terms of beans amounted to 878,000 bushels.

United States produced about 215 million bushels of soybeans in 1949. While this outturn is 2 percent smaller than the record harvest of 1948, this country is again the world's largest soybean producer. The yield of 22.2 bushels per acre is the highest recorded for the United States. The 1949 support price is $2.11 a bushel for green and yellow beans grading No.2 and containing not more than 14 percent moisture.

European soybean production is declining. Italy is the only country reporting production in the current year. The 1949 crop is estimated at 130,000 bushels compared with 107,000 in 1948.

China's 1949 soybean crop, estimated at 179.2 million bushels, is 15 percent less than in 1948 despite an increase in acreage.

Manchuria's 1949 soybean crop of 66.0 million bushels is less than half the prewar output. Production has declined in recent years chiefly because of the difficulty of marketing the beans and the tendency to grow more grains.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations, United States Department of Agriculture, Washington 25, D.C.

SOYBEANS: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1946-49

Continent and country	Acreage					Yield per acre					Production				
	Average 1935-39	1946	1947	1948	1949 1/	Average 1935-39	1946	1947	1948	1949 1/	Average 1935-39	1946	1947	1948	1949 1/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA															
Canada	2/ 10	59	61	94	104	20.7	18.1	18.2	19.4	25.1	2/ 207	1,072	1,110	1,824	2,605
United States 3/	3,042	9,806	11,212	10,311	9,686	18.5	20.5	16.4	21.4	22.2	56,167	201,275	183,558	220,201	215,222
EUROPE															
Bulgaria	34	45	75	-	-	12.1	5.2	5.1	-	-	416	234	385	-	-
Hungary	4/ 7	5	8	6	-	16.9	10.4	10.1	15.1	-	4/ 125	56	81	90	-
Italy	5/	2	7	5	5	12.1	15.8	20.9	21.9	26.7	2/ 1	27	150	107	130
Rumania	2/ 49	-	-	-	-	9.5	-	-	-	-	2/ 463	-	-	-	-
U.S.S.R. (Europe and Asia)	4/ 607	-	-	-	-	-	-	-	-	-	4/ 5,805	-	-	-	-
ASIA															
Turkey	4/ 1	-	5	5	5	29.0	-	10.8	15.3	14.1	4/ 37	16	55	71	66
China proper (22 provinces)	6/ 12,411	11,599	11,641	11,309	11,900	16.7	17.0	17.3	18.6	15.0	6/ 207,666	196,610	201,322	210,820	179,200
Manchuria	8,992	7,187	6,662	-	5,500	16.8	17.1	17.9	-	12.0	151,294	122,639	119,059	-	66,000
Japan	2/ 812	571	607	598	-	15.4	13.0	11.8	14.6	-	12,499	7,418	7,161	8,760	-
Taiwan (Formosa)	2/ 17	-	-	-	-	8.9	-	-	-	-	2/ 151	-	-	-	-
Korea 7/	2/ 1,921	561	568	487	656	10.0	8.8	8.2	10.1	10.0	2/ 17,654	4,924	4,666	4,924	6,899
Indonesia 8/	889	583	700	900	-	10.9	7.6	9.6	8.6	-	9,731	4,406	6,719	7,716	9,000
AFRICA															
Tanganyika	-	-	-	-	-	-	-	-	-	-	-	15	27	97	30
Union of South Africa	-	9	6	13	15	-	6.6	6.6	5.2	5.3	-	56	44	67	80
World total 9/	29,100	32,100	33,250	31,600	31,200	-	-	-	-	-	464,300	550,700	537,000	558,400	501,700

1/ Preliminary. 2/ Average of less than 5 years. 3/ Acreage harvested for beans. 4/ One year only. 5/ Less than 500 acres. 6/ Partly estimated. 7/ Beginning with 1946 figures represent South Korea only. 8/ Java and Madura. 9/ Includes estimates for the above countries for which data are not available and for minor producing countries.

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Japanese soybean production has not been reported for 1949 but is expected to equal the 1948 harvest of 8.8 million bushels. It is difficult to obtain accurate estimates of production in Japan as plantings are principally on small plots for direct consumption by the producer. Possibly not more than one-tenth of the total output is available for oil extraction.

Prior to World War II, Japan's supply of soybean oil came chiefly from beans imported from Manchuria.

South Korean soybean production continues to increase. The 1949 estimate is 6.9 million bushels compared with 4.9 million last year and 4.7 million in 1947. The entire crop is consumed within the country either as food or in the manufacture of edible products. Apparently there has been little, if any, commercial production of soybean oil in South Korea. The Government program for 1950, however, calls for the production of 250 to 300 short tons of oil from soybeans collected this fall.

Indonesian soybean production of 9.0 million bushels is somewhat larger than in 1948 and only 8 percent below the prewar average. Apparently the Government is interested in expanding soybean output. It was suggested at the recent Agricultural Conference in Buitenzorg that production be increased by 3 to 4 million bushels.

Brazil's soybean production has increased steadily in the past few years. The 1949 estimate is 1.0 million bushels compared with 730,000 last year and 430,000 bushels in 1947.

Soybean exports are not separately classified in Brazil's official statistics but reports indicate that shipments amounted to more than 400,000 bushels in 1948 and possibly have been much larger during the current year.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, Chairman, Paul E. Quintus, Regina H. Boyle, Helen Francis, Tilmer O. Engebretson, Mary E. Long, and Dwight R. Bishop.

GRAPE PRODUCTION INCREASES IN 1949

World production of grapes during 1949 is estimated at 36.8 million tons, 7 percent above the 34.5 million produced in 1948 but 7 percent lower than the prewar (1935-39) average of 39.8 million tons. In 1949, 81 percent of the world total, or 29.7 million tons, were utilized for wine, 12 percent, or 4.6 million for table and 7 percent or 2.5 million for drying.

The United States is the largest producer in North America. The output in 1949 estimated at 2,856,000 tons, compared with 3,044,000 in 1948 and 2,444,000 prewar. Production for table use in 1949 is estimated at 636,000 tons. This includes those used for farm household use, consumed fresh and canned. Dried grapes (raisins) are produced only in California where the 1949 crop tentatively is estimated to be 1,120,000 tons. Grapes for wine, estimated at 1,100,000 tons, includes not only those crushed for wine, brandy and juice, but quantities for freezing, jam and jelly.

Europe is the largest producer of grapes for all purposes, and in 1949 has an estimated production of 23,018,000 tons, 10 percent above the 1948 crop of 20,993,000 but 12 percent below the prewar (1935-39) average of 26,248,000 tons. Grapes in Europe are used principally for wine which in 1949 comprised 91 percent of total grape production. Chief producers of grapes in Europe are France, Italy, Spain, Portugal, Greece and Rumania. These countries produce 86 percent of Europe's grape crop. Production of grapes in France, estimated at 6,754,000 tons, consists of table grapes indicated at 159,000 tons and wine grapes at 6,595,000 tons. This is a smaller crop than for 1948 and is the result chiefly of dry weather. Italy, the second largest producer of grapes in Europe, has an estimated crop of 6,513,000 tons, 2 percent higher than the 1948 crop of 6,378,000 but 8 percent below the prewar average of 7,106,000. Persistent dry and warm weather has had an unfavorable effect upon grape production and in Southern Italy there was a premature ripening of the fruit. Approximately 93 percent of all grapes grown in Italy are used for wine and the remainder for table use. Spanish production, estimated at 3,078,000 tons, is 15 percent above the 1948 crop of 2,671,000 tons. The 1949 crop includes the following: table grapes, 262,000; for drying, 38,000 and for wine, 2,778,000 tons. Increased grape and wine production is the result of better supplies of fertilizers, smaller losses due to disease and satisfactory weather conditions in most areas. Portugal and Rumania each show an increase in production of grapes for 1949 while Greece shows a slight decline.

Production in Asia is indicated to be 2,419,000 tons, 2 percent above the 2,383,000 produced in 1948 and 49 percent above the prewar average of 1935-39. Turkey is the largest producer of grapes in this area, producing 1,815,000 tons in 1949, 1 percent above the crop of 1,797,000 for the previous year and 68 percent higher than the prewar production of 1,083,000 tons. Most of Turkey's production is used for the table.

GRAPES, total: Production in specified countries
averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
NORTH AMERICA							
Canada	21	30	33	34	37	29	24
Mexico	13	21	29	32	35	36	40
United States	2,444	2,653	2,781	3,120	3,036	3,044	2,856
Total	2,478	2,704	2,843	3,186	3,108	3,109	2,920
EUROPE							
Austria	156	91	85	179	138	144	142
Belgium 2/	13	13	13	13	13	13	13
Bulgaria	558	530	661	642	415	400	650
Czechoslovakia	81	37	50	121	90	73	67
France	8,763	6,045	3,616	5,221	6,379	6,850	6,754
Germany 3/	429	236	255	160	396	250	315
Greece	1,337	922	706	940	1,076	1,108	1,064
Hungary	704	485	635	733	474	651	848
Italy	7,106	6,261	5,563	6,200	5,817	6,378	6,513
Luxembourg 3/	13	7	4	11	17	17	17
Malta 3/	5	6	12	5	5	2	5
Netherlands	24	16	11	17	18	19	19
Portugal 3/	1,202	1,624	1,730	1,104	1,669	1,200	1,500
Rumania	1,554	1,213	1,194	1,081	711	600	1,000
Spain	3,338	3,289	2,565	3,092	3,247	2,671	3,078
Switzerland	93	113	91	108	130	117	108
Yugoslavia	872	797	844	954	516	500	925
Total	26,248	21,685	18,035	20,581	21,111	20,993	23,018
ASIA							
Cyprus	56	45	45	48	45	51	51
Iran 4/	145	136	132	143	188	167	175
Lebanon	5/	5/	88	72	88	95	96
Palestine	48	54	50	59	64	70	75
Syria	6/ 220	6/ 305	207	164	119	166	167
Turkey	1,083	1,159	1,721	2,092	704	1,797	1,815
Japan	72	63	39	43	35	37	40
Total	1,624	1,762	2,282	2,621	1,243	2,383	2,419
SOUTH AMERICA							
Argentina	1,504	1,490	1,426	1,543	1,915	1,538	1,730
Brazil	229	213	260	175	253	227	250
Chile	506	471	425	422	603	580	590
Peru 3/	31	38	48	50	50	50	50
Uruguay	109	111	121	110	143	124	144
Total	2,379	2,323	2,280	2,300	2,964	2,519	2,764
AFRICA							
Algeria	5,886	3,640	3,278	3,120	3,053	4.366	4,525
French Morocco	99	86	42	57	86	63	85
Tunisia	294	174	86	90	73	140	145
Union of So. Africa	278	451	456	435	465	500	470
Total	6,557	4,351	3,862	3,702	3,677	5,069	5,225
OCEANIA							
Australia	483	506	501	449	505	446	484
World total	39,769	33,331	29,803	32,839	32,608	34,519	36,830

GRAPES for the table: Production in specified countries, averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
NORTH AMERICA							
Canada	10	14	17	10	13	13	10
Mexico	13	21	29	32	35	36	40
United States	665	597	575	607	709	636	636
Total	688	632	621	649	757	685	686
EUROPE							
Austria	1	1	1	1	1	1	1
Belgium	13	13	13	13	13	13	13
Bulgaria	145	118	153	130	115	100	150
Czechoslovakia	9	3	5	15	9	8	7
France	165	172	118	170	228	147	159
Greece	88	60	77	77	88	116	121
Hungary	42	31	65	68	44	61	79
Italy	368	432	416	439	421	458	597
Netherlands	24	16	11	17	18	19	19
Rumania	258	152	166	110	100	90	150
Spain	158	160	152	174	68	349	262
Switzerland	89	109	4	4	5	5	4
Yugoslavia	87	80	85	95	51	50	75
Total	1,447	1,347	1,266	1,313	1,161	1,417	1,637
ASIA							
Cyprus	28	20	22	23	22	25	25
Lebanon	5/	5/	64	52	64	69	70
Palestine	38	43	40	47	50	55	60
Syria	6/ 158	6/ 220	149	118	85	119	120
Turkey	774	940	1,410	1,818	571	1,462	1,500
Japan	72	63	39	43	35	37	40
Total	1,070	1,286	1,724	2,101	827	1,767	1,815
SOUTH AMERICA							
Argentina	256	221	197	136	215	190	200
Brazil	90	90	89	93	75	67	75
Chile	30	35	36	36	36	36	36
Uruguay	6	5	2	4	4	4	4
Total	382	351	324	269	330	297	315
AFRICA							
Algeria	14	18	16	15	17	24	25
French Morocco	20	17	8	11	17	13	15
Tunisia	38	24	14	6	10	18	20
Union of So. Africa	14	21	27	26	29	30	30
Total	86	80	65	58	73	85	90
OCEANIA							
Australia	16	18	17	16	16	16	14
World total	3,689	3,714	4,017	4,406	3,164	4,267	4,557

GRAPES for drying: Production in specified countries, averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average		1945	1946	1947	1948	1949 [1]
	1935-39	1940-44					
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
NORTH AMERICA							
United States	940	1,079	969	733	1,225	894	1,120
EUROPE							
Greece	674	398	205	333	444	409	502
Italy	2	1	1	3	2	3	2
Spain	63	36	35	25	46	29	38
Total	739	435	241	361	492	441	542
ASIA							
Iran	145	136	132	143	188	167	175
Lebanon	5/	5/	13	11	13	14	14
Syria	6/ 33	6/ 46	31	25	18	25	25
Turkey	295	203	286	242	123	310	290
Total	473	385	462	421	342	516	504
SOUTH AMERICA							
Argentina	18	24	18	20	31	25	30
Chile	7	7	5	4	3	4	4
Total	25	31	23	24	34	29	34
AFRICA							
Union of So. Africa	45	51	54	42	42	36	40
OCEANIA							
Australia	351	376	323	282	349	250	290
World total	2,573	2,357	2,072	1,863	2,484	2,166	2,530

GRAPES for wine: Production in specified countries, averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average		1945	1946	1947	1948	1949 [1]
	1935-39	1940-44					
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
NORTH AMERICA							
Canada	11	16	16	24	24	16	14
United States	839	977	1,237	1,780	1,102	1,514	1,100
Total	850	993	1,253	1,804	1,126	1,530	1,114
EUROPE							
Austria	155	90	84	178	137	143	141
Bulgaria	413	412	508	512	300	300	500
Czechoslovakia	72	34	45	106	81	65	60
France	8,598	5,873	3,498	5,051	6,151	6,703	6,595
Germany	429	236	255	160	396	250	315
Greece	575	464	424	530	544	583	441
Hungary	662	454	570	665	430	590	769
Italy	6,736	5,828	5,146	5,758	5,394	5,917	5,914
Luxembourg	13	7	4	11	17	17	17
Malta	5	6	12	5	5	2	5
Portugal	1,202	1,624	1,730	1,104	1,669	1,200	1,500
Rumania	1,296	1,061	1,028	971	611	510	850
Spain	3,117	3,093	2,378	2,893	3,133	2,293	2,778
Switzerland	4	4	87	104	125	112	104
Yugoslavia	785	717	759	859	465	450	850
Total	24,062	19,903	16,528	18,907	19,458	19,135	20,839

Continued---

GRAPES for wine: Production in specified countries, averages 1935-39 and 1940-44, annual 1945-49

Concluded------

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
ASIA							
Cyprus	28	25	23	25	23	26	26
Lebanon	5/	5/	11	9	11	12	12
Palestine	10	11	10	12	14	15	15
Syria	6/ 29	6/ 39	27	21	16	22	22
Turkey	14	16	25	32	10	25	25
Total	81	91	96	99	74	100	100
SOUTH AMERICA							
Argentina	1,230	1,245	1,211	1,387	1,669	1,323	1,500
Brazil	139	123	171	82	178	160	175
Chile	469	429	384	382	564	540	550
Peru	31	38	48	50	50	50	50
Uruguay	103	106	119	106	139	120	140
Total	1,972	1,941	1,933	2,007	2,600	2,193	2,415
AFRICA							
Algeria	5,872	3,622	3,262	3,105	3,036	4,342	4,500
French Morocco	79	69	34	46	69	50	70
Tunisia	256	150	72	84	63	122	125
Union of So. Africa	219	379	375	367	394	434	400
Total	6,426	4,220	3,743	3,602	3,562	4,948	5,095
OCEANIA							
Australia	116	112	161	151	140	180	180
World total	33,507	27,260	23,714	26,570	26,960	28,086	29,743

GRAPES: Total production by continents averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
NORTH AMERICA							
Total	2,478	2,704	2,843	3,186	3,108	3,109	2,920
Table	688	632	621	649	757	685	686
Raisin	940	1,079	969	733	1,225	894	1,120
Wine	850	993	1,253	1,804	1,126	1,530	1,114
EUROPE							
Total	26,248	21,685	18,035	20,581	21,111	20,993	23,018
Table	1,447	1,347	1,266	1,313	1,161	1,417	1,637
Raisin	739	435	241	361	492	441	542
Wine	24,062	19,903	16,528	18,907	19,458	19,135	20,839
ASIA							
Total	1,624	1,762	2,282	2,621	1,243	2,383	2,419
Table	1,070	1,286	1,724	2,101	827	1,767	1,815
Raisin	473	385	462	421	342	516	504
Wine	81	91	96	99	74	100	100
SOUTH AMERICA							
Total	2,379	2,323	2,280	2,300	2,964	2,519	2,764
Table	382	351	324	269	330	297	315
Raisin	25	31	23	24	34	29	34
Wine	1,972	1,941	1,933	2,007	2,600	2,193	2,415

Continued---

GRAPES: Total production by continents, averages 1935-39 and 1940-44, annual 1945-49

Concluded----

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
AFRICA							
Total	6,557	4,351	3,862	3,702	3,677	5,069	5,225
Table	86	80	65	58	73	85	90
Raisin	45	51	54	42	42	36	40
Wine	6,426	4,220	3,743	3,602	3,562	4,948	5,095
OCEANIA							
Total	483	506	501	449	505	446	484
Table	16	18	17	16	16	16	14
Raisin	351	376	323	282	349	250	290
Wine	116	112	161	151	140	180	180
World total	39,769	33,331	29,803	32,839	32,608	34,519	36,830
Table	3,689	3,714	4,017	4,406	3,164	4,267	4,557
Raisin	2,573	2,357	2,072	1,863	2,484	2,166	2,530
Wine	33,507	27,260	23,714	26,570	26,960	28,086	29,743

WINE: Production in specified countries, averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average 1935-39	Average 1940-44	1945	1946	1947	1948	1949 1/
	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons
NORTH AMERICA							
Canada	3,758	5,289	4,967	6,646	7,312	6,500	5,500
United States	193,200	275,028	379,936	515,335	314,328	435,000	330,000
Total	196,958	280,317	384,903	521,981	321,640	441,500	335,500
EUROPE							
Austria	29,178	16,918	15,851	33,439	25,756	31,700	26,841
Bulgaria	48,663	47,637	68,687	69,000	40,500	40,500	67,500
Czechoslovakia	10,984	5,305	6,314	15,481	11,069	8,903	7,925
France	1,603,177	1,105,959	756,039	955,264	1,166,890	1,253,194	1,109,582
Germany	81,007	44,580	48,203	30,272	74,771	47,106	59,353
Greece	99,166	79,941	73,178	91,406	93,784	97,747	118,881
Hungary	102,280	70,194	88,108	102,844	66,449	91,142	118,900
Italy	473,115	920,414	772,251	887,962	841,625	940,058	924,075
Luxembourg	2,432	1,400	793	2,113	3,170	3,200	3,200
Malta	840	970	1,876	785	785	250	800
Portugal	192,088	259,800	276,861	176,710	267,112	192,000	240,000
Rumania	120,377	169,458	167,941	155,276	105,000	89,000	160,000
Spain	491,217	479,664	345,280	454,390	536,285	398,116	475,520
Switzerland	16,564	20,265	16,207	19,318	23,272	20,873	18,493
Yugoslavia	124,566	116,216	116,132	102,924	69,700	67,500	127,500
Total	3,395,654	3,338,721	2,753,721	3,097,184	3,326,168	3,281,289	3,458,570

Continued---

WINE: Production in specified countries,
averages 1935-39 and 1940-44, annual 1945-49

Concluded----

Continent and country	Average		1945	1946	1947	1948	1949 1/
	1935-39	1940-44					
	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons
ASIA							
Cyprus	4,243	3,926	3,619	3,925	3,600	4,100	4,100
Lebanon	5/	5/	2,008	1,630	2,006	2,110	2,100
Palestine	729	1,125	1,509	1,800	2,100	2,250	2,250
Syria	6/ 1,078	6/ 3,429	2,880	2,240	1,700	2,350	2,350
Turkey	28,921	18,976	3,408	3,699	3,963	3,064	3,963
Total	34,971	27,456	13,424	13,294	13,369	13,874	14,763
SOUTH AMERICA							
Argentina	183,914	181,392	169,075	184,926	229,837	179,642	204,000
Brazil	20,813	18,414	25,613	12,339	26,696	24,000	26,200
Chile	84,815	77,664	69,443	69,074	102,019	97,733	100,000
Peru	2,913	3,473	4,062	4,563	4,500	4,500	4,500
Uruguay	16,042	17,577	19,525	17,373	21,000	23,000	26,800
Total	308,497	298,520	287,718	288,275	384,052	328,875	361,500
AFRICA							
Algeria	450,643	278,701	250,971	238,861	233,773	334,293	346,000
French Morocco	14,587	12,612	6,153	8,374	12,680	9,246	12,900
Tunisia	41,518	24,854	17,040	14,477	12,311	19,814	21,000
Union of So. Africa	33,193	57,593	56,978	55,772	59,853	65,925	60,760
Total	539,941	373,760	331,142	317,484	318,617	429,278	440,660
OCEANIA							
Australia	21,139	20,652	31,055	39,861	40,894	47,500	47,500
World total	4,497,160	4,339,426	3,801,963	4,278,079	4,404,740	4,542,316	4,658,493

1/ Preliminary. 2/ Hot house grapes. 3/ Used mostly for wine. 4/ Used mostly for drying.
5/ Included with Syria. 6/ Includes Syria.

Office of Foreign Agricultural Relations. Prepared and estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information.

In South America, production is indicated to be 2,764,000 tons, 10 percent above the 1948 crop of 2,519,000 and 16 percent above the prewar average of 2,379,000 tons. Argentina produces over half the total production in South America and in 1949 her production is indicated to be 1,750,000 tons, compared with 1,538,000 in 1948 and 1,504,000 prewar. Nearly 90 percent of the total crop in Argentina is utilized for wine production estimated to be 204 million gallons in 1949. Production of grapes in Chile, estimated at 590,000 tons, is about the same as last year's crop, and is also used principally for wine.

Algeria produced nearly 90 percent of Africa's total production of 5,225,000 tons in 1949, and is making progress toward achieving the high production levels of the prewar decade when 5,886,000 tons were produced.

Australia's production of 484,000 tons is about the same as was produced last season and prewar.

Wine production in the principal producing countries of the world is estimated at 4.7 billion gallons, 3 percent above the 1948 production of 4.5 billion and 4 percent above the prewar average of 4.49 billion France, the world's largest producer, has an estimated production in 1949 of 1.1 billion gallons, as compared with 1.3 billion in 1948 and 1.6 billion prewar. Italy, the second largest wine producer, has an output of nearly 1 billion gallons, a little less than last season but twice as much as she produced prewar.

INDIA 1949 CASHEW HARVEST BELOW AVERAGE

The 1949 preliminary estimate for Indian cashew production has been revised upward to 38,900 short tons, unshelled basis, compared with 51,000 tons (revised) in 1948 and 26,900 tons in 1947. The estimate is 20 percent below the 10-year (1938-47) average of 48,700 tons and 17 percent below the 5-year (1943-47) average of 46,600 tons. These estimates include production in Portuguese Goa. The estimates are for Indian production of cashews only and do not include imports from East Africa.

The cashew tree grows wild in many parts of India and there are very few commercial plantings. The nature of the industry makes it estremely difficult even under the most favorable conditions to forecast or estimate production accurately. In addition to being a wild crop, there are 3 crops a year and this fact further complicates estimating the size of the harvest. The first blossoms appear in December and the fruit is ready for harvest in February. The first crop usually yields about 50 percent of the year's harvest. The second blossom takes place in February and the fruit is ready for harvest about April. The second blossom usually produces about 35 percent of the harvest. The final blossoming occurs in April and produces fruit in June which makes up about 15 percent of the year's harvest. During 1949, the first two blossoming periods took place under drought conditions which greatly reduced the crop. The third blossom this season benefited from late rains and turned out to be considerably larger than had been anticipated. The Indian-produced nuts are estimated to have produced about 9,700 short tons of kernels.

The importation of African unshelled cashews during 1949 are said to have totaled about 56,000 short tons or the equivalent of 26,400 tons of kernels. The total available supply of cashew kernels during 1949 in India, therefore, was about 36,100 short tons. There was no carry-over from the 1948 crop. Exports from January to August totaled about 12,300 short tons and before the end of the year will total about 19,000 tons. Consumption in India, mostly off-grades, will take the balance of the estimated supply and no carry-over into 1950 is anticipated. The imports of cashews from East Africa are expected to be the largest on record. The African crop was large while the Indian crop was below average. Portuguese East Africa supplied a total of 35,753 tons of unshelled cashews to India during the first half of 1949.

It was estimated that on October 1 the available supply of cashew kernels for export in India totaled about 5,600 short tons. According to Indian statistics exports during the first half of 1949 from South India totaled 8,292 short tons of which 7,465 tons were to the United States, 409 tons to Mexico, 196 tons to Canada, and the balance to various other countries. Bombay during the same period exported 165 tons of which 66 tons were to Pakistan, 47 tons to Hong Kong, and 34 tons to the United States.

The outlook for the remainder of this season and for the 1950 season is a little confusing at this time. Devaluation of various currencies in September resulted in a higher price of African cashews in terms of Indian rupees. There was a rumor early in October that an export duty would be assessed by the Indian Government on export of cashews to the United States and this caused some importers of African nuts to hold back on normal purchases in Africa for next year's operations. In addition, another rumor was heard on the Bombay market that a United States firm planned to purchase about 33,600 short tons of unshelled cashew nuts in Portuguese East Africa to extract shell oil. Exporters believe that the American firm probably will destroy the kernels in the process, thus reducing the available 1950 supply of edible kernels by 8,400 short tons. It is reported a British firm has constructed an oil mill for the crushing of cashew nuts in British East Africa and may process the nuts purchased by the American company.

If the weather and growing conditions in India during December 1949 through June 1950 are favorable a normal cashew crop is expected which would offset to some extent the loss of African nuts reported sold to the

INDIA: Cashew nuts, estimated production, 1949 with comparisons.

(Rounded to nearest 100 short tons)

Year	Unshelled		
	Bombay district 1/	South India	Total
	Short tons	Short tons	Short tons
Average			
1938-47	2/	2/	48,700
1943-47	10,400	36,200	46,600
Annual			
1943	6,700	31,100	37,800
1944	5,600	28,000	33,600
1945	12,600	46,200	58,800
1946	16,800	58,800	75,600
1947	10,100	16,800	26,900
1948 3/ 4/	11,800	39,200	51,000
1949 3/ 4/	5,300	33,600	38,900

1/ Includes Goa.

2/ Not available.

3/ Revised.

4/ Preliminary.

OFAR, USDA. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of offic research and other information.

UNITED STATES: Imports of cashew nuts

(Crop year, September-August)

	Shelled			
	Brazil	India	Others	Total
	Short tons	Short tons	Short tons	Short tons
Averages				
1939-48	164	12,338	225	12,727
1944-48	281	14,501	337	15,119
Annual				
1943-44	110	3,619	309	4,038
1944-45	374	10,239	204	10,817
1945-46	303	13,892	292	14,487
1946-47	309	15,323	383	16,015
1947-48	351	14,749	485	15,585
1948-49	66	18,303	324	18,693
1949-50 1/	0	1,075	0	1,075

1/ 1 month only, September 1949.

Compiled from official records of the Bureau of the Census.

American firm. It is generally believed by exporters that cashew kernels during the next season and possibly into 1951 will be slightly higher priced than before devaluation. There is some reason to believe Indian importers of African nuts will refuse to buy until prices decline to more realistic levels. A government export duty if levied will cause still higher prices.

BRAZIL NUT HARVEST IN 1949 SURPASSES EARLIER PREDICTIONS

The 1949 preliminary estimate of Brazil nut production in Brazil, after some wide fluctuations during the season, is now placed at 35,200 short tons compared with 18,900 tons in 1948 and 30,400 tons in 1947. Early in the season trade sources predicted a harvest of about 33,000 short tons but as the season advanced, estimates were reduced and reached a low of 24,800 tons in July.

The nature of this industry is such that it is difficult to obtain reliable estimates of production. The production depends on market conditions rather than nuts on the trees and only a small fraction of the nuts on trees ever are harvested. The season is about over and final returns indicate the largest crop since 1940 was gathered in 1949. The estimate is 53 percent larger than the 10-year (1938-47) average of 23,000 tons and more than twice the 5-year (1943-47) average of 14,300 tons.

The 1949 estimate of production is distributed as follows; Belem 17,900 short tons; Manaus 15,600 tons; Parintins 900 tons and Itacoatiara 800 tons. These estimates may be compared with those for 1948 which were as follows; Belem 10,900 tons; Manaus 6,300 tons; Parintins 1,000 tons and Itacoatiara 600 tons. While it is much too early and the 1950 harvest has only just started, Trade sources now predict a harvest 30 percent smaller than that of 1949. This early prediction is based on the poor flowering of the trees. As previously stated, however, the gathering of nuts is more dependant on prices than on the quantity available on the trees. If a brisk market develops with attractive prices, additional supplies can be brought out of the more remote areas of the vast Amazon Jungle. The potential production of Brazil nuts is tremendous in view of the vast area in which these nuts are found. The export price and demand stimulates or retards the collection of the nuts each season. The wide fluctuation in estimates of production in 1949 is the result of the condition of the market rather than of the actual supply of nuts in the jungle.

The 1949 season started with fair activity and early sales were gratifying to exporters. The United Kingdom eased its import restrictions fairly early in the season which permitted importers in that country to purchase substantial tonnages. Canadian buyers also were active early in the season. In some respects the season resembled a normal prewar year with the English buying early and then United States buying in volume a little later. The Brazilian exporters were not entirely satisfied with prices received on export sales, claiming they were losing money on the transactions. By mid-season many of them were ready to stop their season's operations but business and prices began to rise and additional large tonnages were brought in from remote areas and exported.

On the basis of preliminary export statistics it appears that exports from the Amazon Basin during the first 7 months of 1949 totaled 11,640 short tons of unshelled and 2,687 tons of shelled nuts.

The United States, as usual, was the principal destination for exports of Brazil nuts. During the first 7 months of 1949 according to Brazilian statistics, 10,028 short tons of unshelled nuts valued at $1,903,476 and 2,481 tons of shelled nuts valued at $1,927,554 were exported to the United States. An additional 715 tons of unshelled and 155 tons of shelled were exported to the United States during August. During the same period the United Kingdom purchased 1,625 tons of unshelled and 36 tons of shelled. Exports on a small scale were made to Belgium, Netherlands, New Zealand, Portugal, and South Africa. By September 1, it was estimated that only 1,485 short tons of unshelled nuts from the 1949 harvest remained unsold. It is reported that these consisted of 825 tons of large Manaus, 550 tons of Mediums and 110 tons of small at Belem. The trade had inquiries from the United Kingdom, United States and Germany at that date which would absorb the small remaining stocks and close the season.

British Guiana.

A trial shipment of 1,000 pounds of Brazil nuts gathered in the interior Rupununi district was distributed recently to local merchants by the marketing organization of the British Guiana Department of Agriculture. The nuts appear to be up to ordinary commercial standards, and now orders are being placed by the merchants. Export possibilities are being considered, with assurances already received that Canada will purchase quantities of these nuts.

The source of supply is a belt of wild nuts in the Rupununi which runs on into Brazil. A potential production of 100,000 pounds a year is given as a conservative estimate. The high cost of gathering the nuts and the air freight of 6 cents per pound are factors hindering the new industry. (British Guiana currency: U.S.$1.00 is now equal to B.G. $1.70 approximately).

BRAZIL NUTS: Estimated commercial production in Brazil, 1949 with comparisons

(Rounded to nearest 100 short tons)

Unshelled basis

Year	Brazil
	Short tons
Averages:	
1938-47	23,000
1943-47	14,300
Annual:	
1943	3,600
1944	3,300
1945	6,800
1946	27,500
1947	30,400
1948 1/	18,900
1949 1/	2/ 35,200

1/ Preliminary.

2/ Revised.

OFAR, USDA. Prepared or estimated on the basis of official statistics of foreign governments, reports of U. S. Foreign Service officers, results of office research, and other information.

UNITED STATES: Imports of Brazil nuts

(Crop year, September-August)

Year	Average		Annual			
	1939/40-1948/49	1944/45-1948/49	1946-47	1947-48	1948-49	1/ 1949-50
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
SHELLED						
Brazil	3,389	2,627	3,260	2,925	2,990	673
Other	75	4	12	2/	10	0
Total	3,464	2,631	3,272	2,925	3,000	673
UNSHELLED						
Brazil	8,178	8,885	11,739	14,336	12,462	4,638
Other	4	0	0	0	0	0
Total	8,182	8,885	11,739	14,336	12,462	4,638

1/ 1 month only, September 1949.

2/ Less than one-half ton.

Compiled from official records of the Bureau of the Census.

COMMODITY DEVELOPMENTS

FATS AND OILS

FRENCH OILSEED HARVEST SETS NEW RECORD

France's oilseed production in 1949 is expected to be the largest on record, according to a report from the American Embassy, Paris. Estimates place the harvest at 203,000 short tons from around 457,000 acres compared with 180,000 tons and 416,000 acres in 1948 and 17,000 tons and 34,000 acres, the 1930-39 average. This expansion resulted primarily from the guarantee of attractive prices for oilseed crops combined with the difficulty experienced by many farmers in obtaining profitable prices for potatoes and some other crops in 1948. Deliveries of seed from the 1949 crop for crushing are expected to amount to 165,000 tons, with rapeseed alone supplying 110,000 tons.

FRANCE: Oilseed acreage and production, 1949 with comparisons

Year	Rapeseed	Poppy seed	Sunflower seed	Others	Total
	Acres	Acres	Acres	Acres	Acres
Area:					
Average 1930-39...	33,754	442	1/	1/	34,196
1947......	142,132	13,511	20,396	170,499	346,538
1948......	239,687	10,905	17,057	148,260	415,909
1949 2/...	276,752	9,384	32,123	138,376	457,135
Production:	Short tons	Short tons	Short tons	Short tons	Short tons
Average 1930-39...	16,904	179	1/	1/	17,083
1947......	41,543	3,178	6,291	41,887	92,899
1948......	121,778	3,351	7,224	48,501	180,854
1949 2/...	139,992	2,205	14,330	46,296	202,823

1/ Not available. 2/ Preliminary.

American Embassy, Paris.

The marked improvement in fats and oils supplies that occurred in France in the winter and early spring of 1949 resulted in the elimination of butter, margarine, and soap rationing in April. Consumption from May to July of hard oils and products made from hard oils dropped to one-third of the former level due apparently to the existence in many households of stocks of soap and margarine and to the abundance of butter that came on the market during the spring months. The drop in consumption occurred at a time when production of hard oils in French Overseas Territories was increasing and the French agency charged with the procurement of fats and oils was burdened with a temporary surplus of such products, particularly palm kernels.

Beginning in August, sales of products made from hard oils increased and the monthly rate of consumption is approaching the level existing prior to last spring. The improvement is due to the gradual exhaustion of family stocks and to the drop in butter production followed by the sharp rise in price, effective September 16. With the cheapest grade of butter quoted in mid-October at 650 francs per kilo (86 cents per pound) retail compared with 232 francs (30 cents) for margarine, the latter has again become more attractive to consumers.

Unlike other fats and oils products, edible liquid oil is not yet free from rationing. Supplies available for Metropolitan France, however, have been more liberal this year than previously. In the course of the winter it became evident that stocks of edible oils in North Africa were much larger than had been realized and consequently, most of the peanut production of French West Africa could be shipped to France.

The current ration of liquid oil is liberal and, at least until the time when butter production diminished in August, was probably little if any below the rate of consumption that would have existed without rationing. Supplies of liquid oil for the coming year, however, are by no means completely assured and, as far as is known, government officials are not now planning to end oil rationing.

DENMARK HAS SMALLER OILSEED PRODUCTION

Danish oilseed production, which provides only a small part of domestic requirements of fats and oils, has dropped sharply from the large output of last year. In 1949, 32,000 acres were planted to flaxseed and 10,000 to mustard seed, according to the American Embassy, Copenhagen. Based on the 1948 yield per acre, production is estimated at 530,000 bushels and 3,500 short tons, respectively.

The 1948 flaxseed harvest was 736,000 bushels, from a record 45,000 acres, and mustard seed about 11,000 tons from 29,000 acres. Several thousand tons of seed from the flax and hemp fiber crops are usually available for crushing.

Imports of oilseeds totaled only 72,000 tons in 1948 compared with 334,000 in 1939. More than 67,000 tons were imported during the first 8 months of 1949. Possibly half of this quantity was soybeans. A sizeable portion of the oil from these seeds is used in the manufacture of margarine. Denmark is eager to increase production and consumption of margarine in order to free butter for export.

U. S. IMPORTS OF SPECIFIED VEGETABLE OILS AND OILSEEDS

The following table shows United States imports of specified vegetable oils and oilseeds during January-October 1949 with comparisons:

UNITED STATES: Imports 1/ of specified oils and oilseeds, January-October 1949 with comparisons

Commodity	Unit	Average 1935-39	1947	1948 2/	January-October	
					1948 2/	1949 2/
Babassu kernels	1,000 lbs.	3/	22,233	61,921	43,390	34,258
Babassu oil	" "	4/ 346	1,747	3,082	1,224	3,036
Castor beans	" "	132,924	276,807	302,511	245,192	214,106
Castor oil	" "	226	6,595	2,441	1,939	7,066
Flaxseed	" bu.	18,470	282	1,066	1,049	148
Linseed oil	" lbs.	713	117,326	3,959	3,604	1,316
Copra	Short tons	230,000	677,660	448,862	369,825	342,520
Coconut oil	1,000 lbs.	342,717	23,559	109,096	69,691	97,877
Oiticia oil	" "	4/ 7,673	8,471	17,558	15,773	6,951
Olive oil						
Edible	" "	62,811	11,250	36,101	29,981	16,768
Inedible	" "	35,448	248	9,775	7,730	2,964
Palm oil	" "	321,482	63,212	63,328	47,804	5/71,310
Sesame seed	" "	58,425	9,479	22,606	21,501	9,157
Tea seed oil	" "	13,159	6,377	3,601	3,437	141
Tucum kernels ...	" "	4/ 9,810	16,887	11,619	11,487	30,183
Tung oil	" "	123,190	121,564	133,282	110,621	49,734

1/ Imports for consumption. 2/ Preliminary. 3/ Not separately classified in Foreign Commerce and Navigation. 4/ Average of less than 5 years. 5/ January-September total should read 65,771 as a result of a change in June figure.

Compiled from official sources.

U. S. EXPORTS OF SPECIFIED FATS, OILS, AND OILSEEDS

The following table shows United States exports of specified fats, oils, and oilseeds during January-October 1949 with comparisons:

UNITED STATES: Exports of specified fats, oils, and oilseeds, January-October 1949 with comparisons

Commodity	Unit	Average 1935-39	1947	1948 1/	January-October 1948 1/	January-October 1949 1/
Soybeans........	1,000 bu.	2/ 4,793	2,505	6,497	2,329	20,823
Soybean oil						
Refined.......	1,000 lbs.	3/ (6,467	38,883	41,266	34,294	177,621
Crude.........	" "		68,395	41,769	39,983	120,684
Coconut oil						
Refined.......	" "	3,789	5,491	9,273	8,773	3,643
Crude.........	" "	10,442	52,427	9,820	9,507	8,898
Cottonseed......	" "	3/	13,771	10,151	8,679	11,615
Cottonseed oil						
Refined.......	" "	4,793	10,977	22,672	20,606	47,430
Crude.........	" "	1,515	901	10,094	3,841	47,957
Flaxseed........	1,000 bu.	3/	16	1,650	126	3,039
Linseed oil.....	1,000 lbs.	1,280	9,855	29,636	25,667	3,425
Peanuts						
Shelled.......	" "	3/ (452	212,253	458,655	291,057	321,214
Unshelled.....	" "		18,681	10,594	7,145	5,399
Peanut oil:						
Refined.......	" "	3/ 4/(325	1,579	685	667	21,271
Crude.........	" "		497	0	0	23,894
Cooking fats....	" "	2,111	3,594	3,522	2,745	21,122
Lard............	" "	165,636	380,735	271,835	215,605	508,817
Oleomargarine...	" "	180	19,954	3,408	3,124	1,762
Tallow						
Edible........	" "	3/ (1,651	601	1,377	1,277	22,328
Inedible......	" "		54,553	67,995	49,837	312,765

1/ Preliminary. 2/ Average of less than 5 years. 3/ Not separately classified in Foreign Commerce and Navigation. 4/ 1939 only.

Compiled from official sources.

GRAINS, GRAIN PRODUCTS AND FEEDS

BURMAN RICE EXPORTS SLIGHTLY LESS IN 1949

Burma's rice exports in November totaled 102 million pounds, bringing January-November shipments to 2,551 million pounds, compared with 2,590 million pounds exported during the corresponding period of 1948. January-November exports of rice bran approximated 68 million pounds.

The first official forecast of Burma's 1949-50 rice crop is 204,100,000 bushels of rough rice (6,430 million pounds milled), or 23 percent less than 264,700,000 bushels (8,338 million pounds) in the year before. This harvest is 58 percent of the prewar (1935-36/39-40) average harvest of 350,000,000 bushels (11,025 million pounds). The production decline is attributed to civil unrest in Burma.

Exportable supplies from this crop for shipment during 1950 are estimated between 1,700 and 1,900 million pounds, a sharp decline below 1949 exports of around 2,600 million pounds. Prewar exports averaged 6,500 million pounds annually.

SIAM'S RICE EXPORTS INCREASE: GOOD CROP FORECAST

Rice exports from Siam during the January-September period of 1949 totaled 2,083 million pounds, a marked gain over 1,318 million pounds during the corresponding period of the year before. October exports were tentatively reported at 77 million pounds, bringing the January-October total to 2,160 million pounds, the largest volume exported since before the war.

The principal countries of destination this year have been India, Malaya, Indonesia, China, and Japan. The share of exports to Asia approximated 93 percent, and to Europe, 6 percent. Exports to European countries were the largest since the war. A total of 129 million pounds were shipped to the following destinations (million pounds): United Kingdom, 64; Netherlands, 34; Norway, 9; Eire, 7; Sweden, 6; Switzerland, 3; Denmark, 3; Czechoslovakia, 2; and Belgium, 1.

Rainfall late in the 1949-50 season was ample to produce a good crop, despite a late beginning of the monsoon. The harvest therefore may approach the near-record crop of last year. The rice surplus harvested mainly in December and available for export in 1950 is estimated by the Siamese Government at 2,650 million pounds, slightly more than the target for 1949 exports of 2,580 million pounds.

SIAM: Exports of milled rice, by country of destination, January-September 1949, with comparisons

Country of destination	Average 1936-40	1947	1948 1/	January-September 1/ 1948	January-September 1/ 1949
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Borneo	7	57	23	2/ 40	2/ 48
Ceylon	111	0	23	21	119
China	71	278	484	332	173
Hong Kong	630	35	132	117	81
India	77	69	365	246	590
Indonesia	26	96	173	143	213
Japan	193	0	0	0	170
Malayan Union	1,118	169	342	259	449
Manchuria	24	0	0	19	0
Philippines	52	39	132	125	91
Belgium	64	0	0	0	1
Germany	62	0	0	0	0
Netherlands	82	0	14	0	34
United Kingdom	75	0	10	10	64
Africa	86	0	0	0	0
Cuba	176	0	0	0	0
Korea	0	0	43	0	0
Others	66	54	49	6	50
Total	2,920	847	1,790	1,318	2,083

1/ Preliminary. 2/ Borneo and Sarawak.

Compiled from official sources and consular reports.

Siamese export prices for white and glutinous rice, effective October 11 through November 3, revised in accordance with the new rates of exchange are given in the following table. These prices are ex-mill or godown in Bangkok and/or Dhonburi, including excise and export duties but excluding cost of gunny bags.

SIAM: Rice prices in terms of U. S. dollars, per 100 pounds

Grade	Price	Grade	Price
	Dollars		Dollars
Sublime, 5 percent broken	5.64	A1 Super	4.31
Extra Super, 10 percent broken	5.45	A1 Special	4.18
		A1 Ordinary	3.99
Super, 15% broken	5.26	C1 Special	3.48
Special, 20% broken	5.07	C1 Ordinary	3.36
No. 1, 25% broken	4.88	C3 Special	2.47
No. 2, 35% broken	4.38	C3 Ordinary	2.41

Compiled from official sources.

U.S. RICE EXPORTS ABOVE AVERAGE

United States rice exports during the first 3 months of the current marketing year (August-July) totaled 240 million pounds compared with 143 million pounds during the corresponding months of the preceding year. Principal destinations were Cuba, Canada, and Jamaica in the Western Hemisphere, and Belgium, Greece, Austria, and Switzerland in Europe.

RICE: United States exports to specified countries, October 1949, with comparisons 1/

Continent and country	August-July		August-October 1/		October 2/	
	1937-38 to 1941-42	1948-49	1948	1949	1948	1949
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Switzerland....	4	5	0	2	0	1
Austria........	4/	22	3/	4	0	0
Greece.........	6	20	5	11	3/	8
Belgium and Luxembourg...	7	8	0	17	0	6
Other Europe...	26	4	2	3	2	3/
Total Europe.	43	59	7	37	2	15
Cuba...........	275	522	94	168	60	107
Canada.........	19	45	7	10	6	6
Venezuela......	2	15	3/	2	3/	1
Br. West Indies	3/	14	1	6	1	3
Philippines....	3/	126	0	2	0	2
China..........	5/	81	12	0	0	0
Indonesia......	5/	89	15	0	13	0
Korea..........	5/	4	4	0	0	0
Other countries	19	38	3	15	1	3
Total........	358	993	143	240	83	137

1/ Milled rice, including brown, broken, screenings and brewers rice, and rough rice converted to terms of milled at 65 percent. 2/ Preliminary. 3/ Less than 500,000 pounds. 4/ Not separately classified. 5/ If any, included in "Other countries".

Bureau of the Census.

October deliveries approximated 137 million pounds compared with 83 million in the same month a year earlier. More than 100 million pounds were sent to Cuba that month, and 15 million pounds to European countries.

COLOMBIA PRODUCES RECORD RICE CROP 1/

Colombia will harvest a record rice crop in 1949, according to Kenneth Wernimont, Agricultural Attache, American Embassy, Bogota. Production, harvested mainly in December, is estimated at 11,790,000 bushels (345 million pounds milled) compared with 10,887,000 bushels (318 million pounds) in the preceding year, and an average of 3,142,000 bushels (92 million pounds) before the war (1935-39). The acreage planted to rice next season also is expected to increase.

Exportable supplies for shipment in 1950 may approximate 15 million pounds. So far in 1949, exports have totaled 1,631,000 pounds to Venezuela and Jamaica. No imports in 1949 have been reported officially. The largest exports in 1946 totaled 14,178,000 pounds, and no exports were shipped in 1947 and 1948. Following the relatively heavy exports of 1946, a corresponding importation in 1947 of 13,452,000 pounds was required in order to meet domestic requirements.

TOBACCO

MEXICO'S 1948-49 TOBACCO CROP ESTIMATE REVISED DOWNWARD

Mexico's production of leaf tobacco during the 1948-49 season is now estimated at 53.5 million pounds, or 10 percent below an earlier estimate of 59.4 million pounds, according to the American Embassy in Mexico City. This compares with 50.9 million pounds in 1947-48 and an annual average of 51.4 million pounds during the previous 5 years, 1942-43 through 1946-47.

Native light types of leaf accounted for 64 percent of total production in 1948-49, as compared with 55 percent in 1947-48. Production of these types totaled 34.4 million pounds in 1948-49 and 28 million pounds in 1947-48. In addition to native light types, Mexico in 1948-49 produced 15.8 million pounds of dark leaf, 2.5 million pounds of flue-cured and 838,000 pounds of Burley.

The country's 1949-50 crop, the planting of which began in September, is tentatively forecast at about 4 percent above the 1948-49 harvest. An increase in the production of flue-cured and dark types is anticipated, while the production of Burley and native light types is expected to be about the same as in 1948-49.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations, United States Department of Agriculture, Washington 25, D.C.

BRAZIL'S 1949 TOBACCO EXPORTS ABOVE 1948

Brazil's exports of leaf tobacco during the first 6 months of 1949 were 38 percent above the corresponding period of 1948, the American Consulate in Porto Alegre reports.

The country's leaf exports for the 6 months ending June 30, 1949, totaled 35 million pounds, or a monthly average of about 5.8 million pounds. This compares with 25.4 million pounds, or a monthly average of about 4.2 million pounds during the first half of 1948 and a total of 54.8 million pounds, or a monthly average of slightly under 4.6 million pounds for the calendar year 1948. The 1949 exports, however, still are below the rate during the calendar years 1946 and 1947 when Brazil's exports totaled 116.6 million pounds and 82.6 million pounds, respectively.

During the first half of 1949 the most important outlets for Brazilian leaf were Spain, Germany and Argentina. These countries took 11 million pounds, 9.8 million pounds and 4.1 million pounds, respectively. Other important outlets for Brazilian leaf during 1949 include Belgium, Denmark, the Netherlands, Switzerland, Indochina, Morocco and Uruguay.

CYPRUS PROPOSES ESTABLISHMENT OF CENTRAL TOBACCO MARKETING ORGANIZATION

The establishment of a central marketing organization for handling Cyprus' entire tobacco crop has been proposed by the Government's tobacco expert, reports the American Consulate in Nicosia. The Cyprus Government has announced that it is prepared to initiate the plan if the majority of growers approve it, and it can be made self-supporting.

Under the proposal only growers who are registered with the marketing organization would be permitted to grow tobacco. Farmers would be required to deliver their entire tobacco crop to the organization and would be granted an initial advance not exceeding 50 percent of its estimated value at the time of delivery. The central marketing agency would then grade, bale and market the leaf.

Control of the proposed organization would be vested in a board of directors composed of representatives of growers and members of their cooperative societies and other interested parties nominated by the Government.

Cyprus' 1949 production of leaf is estimated at 1.6 million pounds, compared with about 2.7 million pounds annually in 1946, 1947 and 1948. The quality of this year's crop is reported to be very good and it is expected that the price will average between 2 shillings (28 cents) and 2.2 shillings (31 cents) per pound.

TROPICAL PRODUCTS

BRAZIL EXPECTS LARGER CACAO OUTPUT IN 1949-50

Brazil's 1949-50 cacao production is now expected slightly to exceed 300 million pounds, according to the American Consulate in Bahia. This is substantially higher than an earlier 1949-50 forecast of 275 million pounds, and compares with revised estimates of 276 million pounds in 1948-49 and 220 million pounds in 1947-48. Brazil's annual average pre-war (1935-39) cacao production amounted to 264 million pounds.

The expected increase in production is attributed principally to favorable weather conditions. Rain and sunshine were well distributed to meet crop requirements. Increasing yields of maturing young trees planted from 1940 to 1943 will also contribute to a larger crop in 1949-50.

Between October 17 and November 15, 1949, United States buyers purchased in the Bahia market some 440,000 bags (132 pounds each) of cocoa beans ranging from U.S. 19 to 21.25 cents per pound c.&f. New York. Most of the sales were for prompt shipment (October-November) and returns from them enabled Bahia dealers to purchase remaining interior stocks from the mid-crop. It is reported that total sales from the mid-crop have been between 800,000 and 850,000 bags. The revival of United States purchases in late October and early November came after several months of inactivity in the market.

GUATEMALA'S 1949-50 COFFEE PRODUCTION LARGER THAN EXPECTED

The outlook for the 1949-50 coffee crop in Guatemala is favorable despite heavy October storms, and the exportable output now is expected to exceed 900,000 bags. This is substantially higher than an earlier forecast of 750,000 bags, and about equal to the revised estimate of 920,000 bags produced for export in 1948-49, according to the American Embassy in Guatemala.

Growers report that coffee plantations generally escaped serious damage from the two severe storms and floods that struck Guatemala at the end of September and the middle of October. Some mature berries were lost in the lower altitude districts from rain and winds and picking was delayed. The storms also damaged drying floors and other plantation structures, and small quantities of harvested coffee were lost. Destruction of highways and railroads caused inconvenience to growers by temporarily halting movement of coffee from plantations to ports, but little coffee was lost on this account.

Storm damage to coffee at higher altitudes, where the beans were still immature, was inconsequential. The important producing area around Coban in north central Guatemala was not in the path of the storms. Estimates of coffee losses from the storms and floods are now placed at about 5 percent as compared with earlier estimates ranging from 10 to 30 percent.

Domestic consumption of coffee in Guatemala is estimated at around 230,000 bags annually. Total production for 1949-50 is forecast at 1,130,000 bags. If coffee prices continue high, Guatemalan domestic consumption is expected to fall off, thereby enabling an export of over 900,000 bags.

Reported exports of coffee from Guatemala in the 1948-49 crop year (October 1 to September 30) amounted to 917,000 bags. Of this amount, 844,000 bags were shipped to the United States, 23,000 bags to Canada, 20,000 bags to Belgium, 14,000 bags to Italy, 8,000 bags to Switzerland, and 7,000 bags to the Netherlands.

COTTON AND OTHER FIBER

COTTON MARKET IN PERU INACTIVE WITH LITTLE COTTON LEFT FOR SALE

Practically all cotton of the Tanguis variety in Peru has been sold and only about 40 percent or around 12,000 bales of the small Pima crop were being held at the middle of November pending more stabilization of the currency exchange rate. Stocks in port were down to 58,000 bales (of 500 pounds gross) on October 28, 1949, compared with 90,000 a year ago when stocks were below normal. Stocks at mills and elsewhere totaled about 30,000 bales on August 1.

A decree issued on November 11, 1949, suspended the official rate of exchange for the sol. Formerly, exporters were required to accept the official rate of exchange for 45 percent of their export proceeds and could sell the remaining 55 percent on the free market. The effect of the lack of exchange controls on the cotton market will not be significant until the next crop is harvested beginning in April, because practically all of the 1948-49 crop has been sold. All price controls (except those on bread, wheat, flour, and fuel)were abolished by the decree mentioned above. Also, under the decree every employed person was granted a 20 percent increase in pay on the first 400 soles ($25.77 at the current free market rate) per month. The increase amounts to 8 soles ($5.15) a month.

The 1948-49 crop of 264,000 bales from 358,000 acres indicates a low yield of only 354 pounds per acre, compared with 421 pounds a year ago when 282,000 bales were harvested from 321,000 acres. Water for irrigation was adequate in 1948-49 but yields were reduced by unusually heavy insect damage in the central valleys.

Cotton growers are expected to increase the acreage of the 1949-50 crop (now being planted) as a result of anticipated higher prices. The scarcity of stocks of cotton available for sale, the lifting of price controls, and the more favorable rates of exchange available on the free market should all tend to raise the price of Peruvian cotton.

PERU: Exports of Cotton by Countries of destination; averages 1934-38 and 1939-43; annual 1946-48; August-October 1948 and 1949.

(Bales of 500 lbs. gross)

	Year beginning August 1					August-October	
	Average		1946	1947	1948	1948	1949
	1934-38	1939-43					
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
United Kingdom	163	75	58	53	105	28	25
Germany	90	1	0	3	0	0	5
Belgium-Luxembourg	16	2	17	29	25	7	10
Italy	4	3	31	6	10	3	1/
France	9	2	9	0	1	1/	1/
Netherlands	13	4	14	18	6	3	1
Sweden	1/	1	2	1	0	0	2/
Switzerland	0	1	29	19	7	5	1
Japan	29	59	0	0	1/	0	2/
India	4	1/	46	13	17	2	8
United States	1	12	38	23	5	4	10
Argentina	3/ 1	4	6	6	4	1	3
Chile	7	28	41	34	9	2	10
Colombia	2/	14	55	37	17	9	7
Ecuador	2/	2	3	6	0	0	2/
Venezuela	3/ 1	3	4	2	0	0	2/
Others	2	17	13	17	3	0	1
Total	340	228	366	267	209	64	81

1/ Less than 500.
2/ If any, included in other countries.
3/ One year only.

Compiled from U. S. Foreign Service Reports.

Exports of 81,000 bales of cotton during August-October 1949 were slightly larger than the 64,000 bales exported during a corresponding period last year. Increases in exports to Chile, India, United States, and Germany were partly offset by smaller exports to Italy, Switzerland, and the Netherlands.

COTTON CONSUMPTION IN BELGIUM AT HIGH LEVEL

Cotton consumption in Belgium has made a marked recovery from a year ago and is now running above 1948, according to Jerome T. Gaspard, Agricultural Attache, American Embassy, Brussels. If the present favorable situation continues it is estimated consumption will reach 420,000 bales or 9 percent above the 1948-49 season and about equal the record consumption in 1947-48.

Belgian cotton spinning activity has risen sharply in the past few months from the low period in December 1948 and the Belgian mills now are operating at capacity. In July 1949 there was a temporary drop in production, due to the annual period of vacations, but yarn production soon recovered and reached a new high in September of 7,860 metric tons or about 25 percent above prewar. 1/

There is no shortage of labor for the Belgian spinning mills; in fact, there is considerable unemployment in the Ghent area.

Belgian cotton spinning capacity has been increasing. In 1939 the 55 spinning mills had a total of 1,984,000 spindles. By 1945 this number was reduced to about 1,900,000. This year the number of spindles is reported at 2,175,000, with a new mill soon starting production, which will bring the total to 2,300,000 or about 16 percent above prewar.

It is still too early to appreciate the probable effect of the general wave of currency devaluations in September. Belgium devalued its currency by only about 12 percent, that is, to a lesser extent than the Netherlands, the Scandinavian countries, and several other countries that take a large share of Belgium's textile exports. Belgium may find difficulty maintaining exports to these markets as well as meeting the intensified competition of the United Kingdom that devalued its currency by 30.5 percent. Belgian exports of cotton yarn and cotton goods have been increasing in the past few months and in September were at a record high or nearly double the prewar level. Stocks of cotton textiles at Belgian mills have been dropping sharply in recent months as a result of the large volume of exports; and, according to trade sources, are presently very low.

1/ 7,860 metric tons yarn production would indicate a consumption of 39,000 bales in September.

Belgian stocks of raw cotton are also at a very low level. On July 31, 1949, they were reported at 80,000 bales or about two-months' supply, whereas normal stocks would amount to at least 135,000 bales or nearly four-months' supply.

In the 1948-49 season Belgium's import of 152,000 bales of United States cotton was financed by "free" dollars, except for 1,000 bales. Belgium is continuing the purchase of United States cotton with free dollars but devaluation has increased the price of United States cotton in terms of Belgian francs. Recently an authorization of $3,000,000 was granted by E.C.A. for financing imports of cotton into Belgium. This will enable procurement of about 20,000 bales. Belgium's import requirements have been estimated at 450,000 bales, of which it is now expected 125,000 to 160,000 bales will be secured from the United States.

DROP IN URUGUAYAN COTTON CONSUMPTION

Cotton consumption in Uruguay experienced a sharp decline in the 1948-49 season and was reported at 19,000 bales (480 pounds net), as compared to 30,000 bales in the previous season. The decline was due principally to the inability of high-priced Uruguayan textiles to compete successfully with foreign manufacturers. This resulted in a loss not only of cotton textile export markets but also in increased competition in the local market from imported textiles. Local mills reportedly have reduced their prices by as much as 25 percent in some cases but are still undersold by imported goods, much of which has been brought in under trade agreements which Uruguay has made with various countries.

Imports of raw cotton during the 1948-49 season were reported at 19,700 bales. About one-half of these imports, or 11,680 bales, was secured from Paraguay. Imports from Brazil amounted to 6,700 bales, from Peru 830 bales, and from the United States 470 bales. Stocks of cotton at the beginning and the end of the season were estimated at about 3,000 bales.

Recently, the first crop of cotton ever grown in Uruguay was sent to the mills. Cotton growing is making some progress and is averaging good yields.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON WORLD MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	12-8	99.05 lbs.	Tallari	73.70	42.72
Ashmouni, F.G.F.	"	"	"	71.45	41.42
Karnak, Good	"	"	"	76.80	44.52
Karnak, F.G.F.	"	"	"	69.80	40.46
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	1/ 620.00	16.50
Broach Vijay, Fine	"	"	"	1/ 690.00	18.37
Karachi		Maund			
4F Punjab, S.G., Fine	12-7	82.28 lbs.	"	78.00	28.60
289F Sind, S.G., Fine	"	"		84.50	30.98
289F Punjab, S.G., Fine	"	"	"	87.00	31.90
Buenos Aires		Metric ton			
Type B	"	2204.6 lbs.	Peso	1/ 4000.00	37.55
Lima		Sp. quintal			
Tanguis, Type 5	"	101.4 lbs.	Sol	(not	quoted)
Pima, Type 1	"	"	"	(not	quoted)
Recife		Arroba			
Mata, Type 4	"	33.07 lbs.	Cruzeiro	(not	available)
Sertao, Type 5	"	"	"	210.00	34.55
Sao Paulo					
Sao Paulo, Type 5	"	"	"	188.00	30.93
Torreon		Sp. quintal			
Middling, 15/16"	12-8	101.4 lbs.	Peso	210.00	23.96
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXXX	29.63

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

1/ Nominal.

LATE NEWS

The second official estimate places the 1949 cotton crop in Egypt at 1,692,000 equivalent bales of 500 pounds gross weight. This is 76,000 bales higher than the first estimate but 144,000 below the final estimate for 1948.

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The time basis of the Cuban tariff import quota on rice was changed from a calendar year to a July 1-June 30 crop year in Decree 4911, announced on November 28. The decree amended the applicable portions of Decree 1747, May 26, 1949, which effectuated the tariff quota as embodied in Schedule IX of the General Agreement on Tariffs and Trade. The amount of the quota for the current crop year 1949-50 shall be determined by the same methods set forth in Decree 1747, and all rice imported on and after June 10, 1949, shall be charged against the 1949-50 quota.

The provisions of the new decree are substantially the same as in Decree 1747, except that to facilitate the use of a new quota year, changes have been made in the dates when the Ministers of Agriculture and Commerce are to make their respective estimates of domestic rice production and consumption and announce the import quota. The amount of the quota for 1949-50 has not yet been disclosed, but indications are that it will be set at the same level as for the 1949 calendar year (451 million pounds).

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Ireland resumed limited bacon exports to the United Kingdom in October after a lapse of 7 years. Supplies of bacon pigs delivered at factories continue to increase. Hog numbers in June of this year were about 45 percent larger than a year earlier.

The Minister of Food in the United Kingdom recently announced that weekly meat rations would be increased from 1s.4d. (19 cents) to 1s.6d. (21 cents) beginning December 4, 1949. This increase will be maintained until cold storage stocks are reduced to more normal proportions.